User Manual - Platform usage

Intelligent Tools for Policy Design

User Manual

Project Reference No.:	287119
Nature:	Report
Dissemination Level:	Public
Document Version:	FINAL
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Document Description:	This is the user manual of the FUPOL system. The objective of this document is to describe system from the user's point of view, to give guidance on using its features and to support the user in learning about FUPOL.

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Introduction

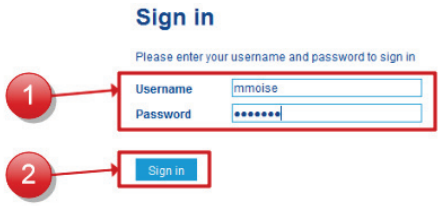
The FUPOL system aims to develop a new governance model to support the policy design and implementation lifecycle starting from the early automatic detection of citizen's needs. This new governance model is built on Web 2.0 as well as existing know-how and government data available to create better policies and decisions based on the citizens' expectations.

The FUPOL Core Platform is a central module of the FUPOL System. By using this platform the decision makers from the administrative branch may to reach better decisions regarding various urban policies by involving the citizen participation in a democratic decision-making processes at the local level.

The objective of the User Manual is to describe the FUPOL core platform from the user's point of view in order to give them a guide on using its tools and to support the users in learning about FUPOL.

Accessing FUPOL

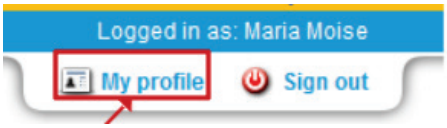
Signing In



1. Provide your username and password
2. Click the 'Sign in' button.

After signing in you should see the FUPOL Console's start page:

Viewing own profile



After signing in, user can view his own profile information by clicking the "My profile" link.

Clicking the link takes the user to the "View account data" page where important information is visible:

1. Account data
2. Personal data
3. Social media windows created by the user

Signing Out

We recommend signing out from the application if you won't use the system for some time. Signing out is done by clicking the 'Sign Out' link that is placed on the right edge of the menu bar:

Please note that the FUPOL Console will sign you out if you don't interact with the application for more than 15 minutes (session timeout). In that case the following screen will be shown:

In order to continue working with the application you'll have to log in again (click the 'Goto Homepage' link to access the signin-page).

Working with Campaigns

What is a campaign ?

A campaign is an important container domain object in FUPOL, that is used to group all activities and their associated data as related to a policy research task.

For the campaign management (creating and working) there are some FUPOL modules of core platform and campaign's members that work with the campaigns. The working with this FUPOL core platform helps the decision makers from the administrative branch to reach better decisions regarding various urban policies by involving the citizen participation in a democratic decision-making processes at the local level.

The Campaign as a main part of FUPOL's "tool box approach" works with the FUPOL modules and it does not necessarily follow a predefined workflow.

A Campaign can be seen as small "research project" and as such it has a defined lifecycle, including a planned and an actual end date.

Lifecycle

The lifecycle of the campaign contains the following states:

- the start state
- the active state
- the finished state

In the start state some campaign's members prepare the campaign. Thus, the initiator, that is the decision maker (i.e. the mayor, other administrative officials) assigns to the facilitator (the main actor in creating and managing of a campaign) the research task (residential neighborhood, tennis court, green space etc.) in order to create it and manage the Campaign.

In the active state the facilitator has several tasks, starting with creating a new campaign that refers to creating, saving and editing the campaign. Another task is to manage the campaign, and it refers to:

- publish interactive maps in order to integrate into some web sites to support eParticipation; that means people an input their opinions regarding certain aspects of the campaign in a friendly map environment;
- view geo-referenced data in order to get the details on the opinions provided by eCitizens during a campaign;
- collect campaign related data from social media platforms such as facebook and twitter.

In the finished state, at the end of a campaign (either the planned end data has been reached or the facilitator is already satisfied with the results) the facilitator closes the campaign. This task includes writing a campaign result report where the facilitator summarizes the campaign's outcome for the decision maker and for future purposes.

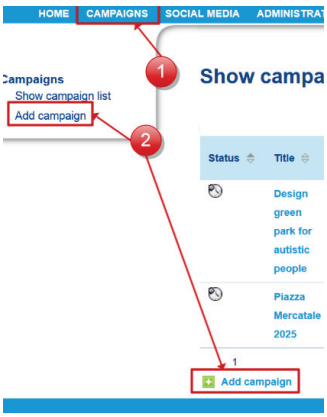
As follows we set to explain the campaign's workflow and what should be done by each task.

1. Create Campaign
2. Edit Campaign
3. Manage Campaign
4. Finish Campaign

Creating a Campaign

Campaigns can only be added by users with the role facilitator. This is usually done after the facilitator has been assigned a research task by the decision maker. In order to create a campaign the facilitator performs the following steps.

Step 1: Creating the New Campaign

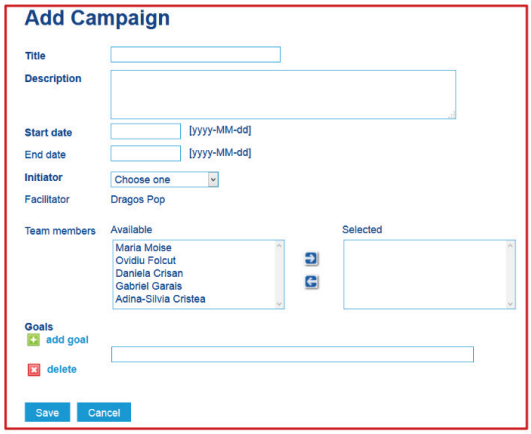


Create a new campaign by selecting the "Add campaign" link from the campaign-menu. Alternatively you can select the "Add campaign" link that is shown below the campaign list:

Step 2: Providing the New Campaign's Basic Data

The new campaign's detail page will open:

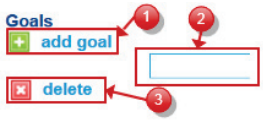
The following data has to be provided:



Data	Content
Title	The title that identifies the camapgin for the user
Description	A short text describing the campaign
Start Date	The date when the campaign shall start. The field offers a date picker component to help the user input a correct date.
End date	The date when the campaign should finally deliver its results. This date must not be in the past and it must be after the start date. This field also offers a date picker component, identical to the "start date" field.
Initiator	The user that is interested in the campaign's results. The user must have the role 'decision maker'. This field offers a drop down list component so that an initiator is chosen from the list of available users.
Facilitator	The facilitator that creates the campaign. This data is preset to the current user's name.
Team members	A list of all (internal) users that are part of the campaign. These users will be able to work with the campaign's data. Use the arrow buttons to move team members into and out of the team. Note that the current user (facilitator) is always part of the team and can't be removed from the team.

A list of goals that the campaign must achieve in order to be successful. Multiple goals can be added to single campaign by clicking the "add goal" link (1) and filling in the text box (2). Also, a goal can be removed by clicking the "delete" link (3)

Goals



Finding Useful Goals

It's important to get a clear picture of what insights the campaign shall produce in order to be successful. Think of a campaign as some kind of 'political project' and define what has to be there at the end of the campaign so that the initiator (decision maker) is happy with the results and considers it to be successful.

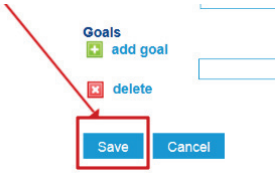
Try to write the goals as 'output targets' (something that has to be achieved) instead of 'input targets' (something that has to be done). Note that goals should be SMART:

- S pecific
- M easurable
- A ttainable
- R Relevant
- T timely

The number of goals is unlimited, but the facilitator must provide at least one of them.

Step 3: Save the Campaign

The facilitator must save the created Campaign, by selecting the Save button on Add Campaign page.



Editing a Campaign

A created campaign may be edited by the facilitator, when some input data were incomplete or incorrect. For editing a campaign the facilitator must ensure that the Campaign is not in the finished state.

When the facilitator edits a campaign he/she might change one of the following data:

- the campaign's name
- the campaign's description;
- the end date (only if it is in the future);
- the team (add/remove team members);
- the goals (delete/add new goals);
- the initiator (only users with role 'decision

Edit Campaign
Title
Design green park for autistic people
Description
The green parks for autistic people help people with autism to make the world a more accessible place into a natural environment, that proves to be highly beneficial for their mental and physical well-being.
Start date
2013-02-18
[yyyy-MM-dd]
End date
2013-03-22
[yyyy-MM-dd]
Initiator
Maria Moise
Facilitator
Maria Moise
Team members
Available
Ovidiu Folcut
Selected
Gabriel Garais
Daniela Crisan
Adina-Silvia Cristea
Goals
add goal
80% of all neighbors within a range of 500m are able to access the green area
Safety and security are not hampered by the new green area. The relevant KPI
Access to the green area is familiar to the neighborhood. More than 50% of the
Autistic people find the area pleasant and non-disturbing (no sensory overload).
delete
delete
delete
delete
Save
Cancel

maker' are selectable)

Note that removing/changing the facilitator is not possible

After editing the campaign the facilitator must save the created campaign, by clicking on "Save" button.

Working with a campaign

The View Campaign page for a given campaign can be accessed from the "Show Campaign List" by clicking on the campaign name as seen below (1).

Once on the "View Campaign" page, the facilitator can work with the campaign by using the tab bar available at the top of the page (1) or the option links at the bottom of the page (2) as seen in the following diagram.

Managing a Campaign

After the campaign has been created it can be used for work, finally achieving the defined goals.

This action includes the followings:

- working with opinion maps
- working with questionnaires
- working with the Data Dictionary
- working with the Dashboard
- working with social media platforms

Opinion Maps

In order to invite eCitizens to participate for expressing their opinions in a geo-referenced points-of-interests (for example, design a green space for autistic people, a place in some city, a traffic crossing or a park, some unused space etc.) that we would like to collect in FUPOL, the facilitator must publish an interactive map in order to integrate it into some web site for supporting eParticipation.

Opinion maps can only be created for active campaigns.

To publish an interactive map the facilitator must provide the input data, such as:

Data	Content
title	The title that identifies the opinion map to the user
description	A short description providing some hints on the üirpose and usage of the map
bounding box	The geographic extents of the bounding box that limits the are that opinions can be provided for

Creating an Opinion Map

The creating of the opinion map is made by the facilitator, after he has created a Campaign. For create an opinion map the facilitator must be sure that the Campaign is not in the finished state.

In order to create an opinion map the facilitator must Sign into the FUPOL console, as shown in the Accessing FUPOL chapter. After that, the facilitator must perform the following steps:

Step 1:Selecting created Campaign

After signing in, the FUPOL Console's start page will appear, where the facilitator selects the "CAMPAIGN" menu, and then the page with the created campaigns will show up.

On this page the facilitator selects one of the created campaigns for which he wants to create an opinion map, by clicking on campaign's title.

Step 2: Add Opinion Map

After clicking on campaign's title the View Campaign page loads. On that page there is a series of tabs at the top. In order to add an opion map, one needs to navigate to the Tools tab as described bellow.

1. Click the Tools tab

On the tools tab, data regarding the campaign's opinion maps and questionnaires can be found. In order to add an opinion ma, click the link that says "Add an opinion map", as described bellow.

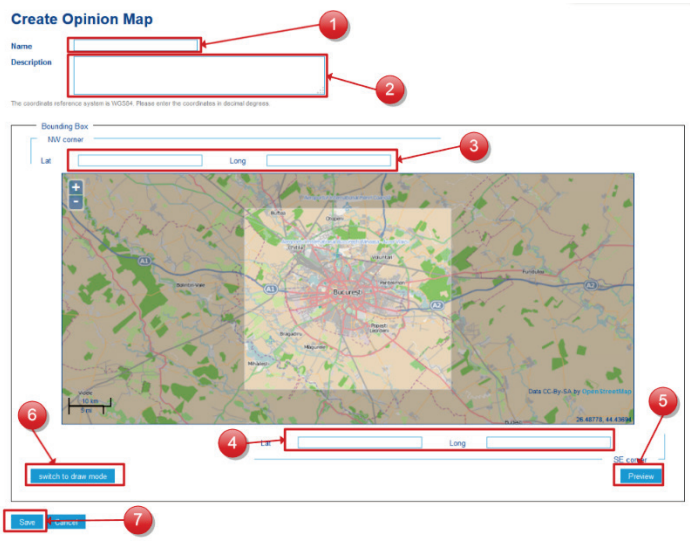
Step 3: Providing the input data of opinion map and saving the map

Note that the area available to the facilitator is the area defined to the FUPOL client (highlighted). The facilitator can not create an opinion map outside this area.

Also note that the coordinates are to be provided using decimal degrees in WGS 84 format (geographical reference system) .

On the page the facilitator has the following options:

1. Enter the opinion map's title
2. Enter a short description



3. Enter the coordinates in decimal degrees for Nord Corner - NC (Latitude and Longitude)
4. Enter the coordinates in decimal degrees for East Corner - EC (Latitude and Longitude)
5. Preview the map with the input coordinates
6. Switch to draw mode
7. Save the map

After the map is created an interactive map's definition is added to the campaign and a map layer (map layer is linked to the campaign) for storing the eCitizen's opinions is created in the GIS. The system will provide a markup-free interactive map that can be integrated into existing web pages (i.e. on the municipality's web site).

Managing an opinion map

After an opinion map is created, the facilitator can manage certain aspects like locking state, visibility and availability.

In order to manage an opinion map follow these simple steps:

1. In the FUPOL client navigate to the "Campaigns" section
2. Click the name of the campaign the opinion map is associated to
3. On the "View campaign" page scroll down to the "opinion maps" section and click on the desired opinion map
4. Handle options on the opinion map page

Step 1: Navigate to the Campaigns section

After log in, access the Campaigns section from the top navigation section.

Step 2: Navigate to the desired campaign

Once on the campaigns page, look for the list of available campaigns on the bottom of the page and click the name of the desired campaign to navigate to its' page (illustrated bellow).

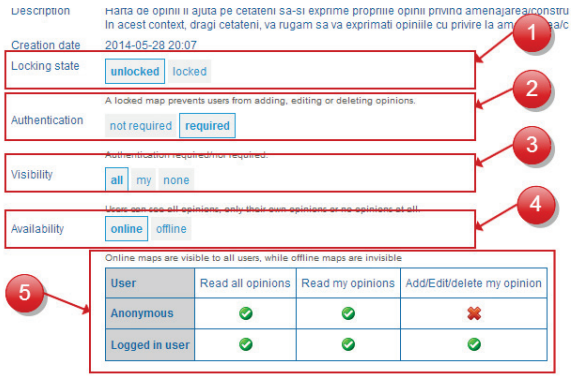
Step 3: Select the desired opinion map

On the Tools tab, select the desired opinion map.

Step 4: Handle different options

On the View Opinion Map page the facilitator can alter three important options:

1. Locking state
2. Authentication
3. Visibility
4. Availability



The **locking state (1)** of an opinion map tells whether citizens are allowed or prevented from adding, editing or deleting opinions.

The **authentication option (2)** is used in order to let or prevent anonymous users from posting opinions.

The **visibility (3)** of an opinion map handles how a citizen views the opinion already input on the map. The options are to view all opinion, just own opinion or no opinions at all.

The **availability (4)** option tells whether the map is

available for citizens to use or is invisible and thus unusable by them.

Different combinations of these three options generate different **permissions (5)** for the two types of citizens: an anonymous user or a logged in user.

The following illustration shows an opinion map with default settings for locking state (1), authentication(2), visibility (3) and availability (4). Please note the permissions table (5) which describes what the two types of users can accomplish based on the values set for the three options (1, 2, 3, 4).

If the values of the three options would change, the permissions table would automatically reflect the changes.

In order to change an option follow these steps:

1. click on the new value (e.g. change visibility to "my")
2. confirm the change

Integrating into an existing website

In order to gather opinions from eCitizens, an opinion map can be integrated into an existing website (e.g. a pilot city website or a municipality website) via the map's unique URL. The facilitator can provide the webmaster of the target website with the map's URL or a piece of HTML code that will be used to integrate the opinion map.

When deciding to send the HTML code to the target webmaster, the facilitator can make a choice between two representations of an opinion map:

- editable
- read-only

An **editable** representation of an opinion map allows eCitizens to express their opinions by setting pins on the map. Setting a pin is done by right-clicking on the desired location on the map and filling in the text box that pops up. In order to set a pin and express an opinion a visitor must log in using a social media account (Twitter or Facebook). Also, all the opinions previously expressed by other eCitizens are available for reading by clicking on the visible red pins. The current visitor's opinions (if any) are marked by blue pins. One can use this option during a campaign to collect opinions.

A **read-only** representation of an opinion map only allows reading of already expressed opinions.

Take the following steps to view an opinion map's URL and example HTML source code:

1. Log into the **FUPOL Client**
2. Navigate to the **Campaigns** section
3. Navigate to the **desired campaign**
4. Select the **desired opinion map**
5. Scroll to the **Representations** section
6. Chose one of the 3 options available

Step 5: Scroll to the Representations section

Once on the opinion map page scroll to the Representations section, where you'll find the two versions of the opinion map: the editable version and the read-only version (illustrated bellow).

Step 6: Chose one of the three options available

From one of the two representations either:

a) copy the map's **URL**
b) generate and send an **email** containing the map's URL and an HTML code example
c) view and copy the **HTML code example**

Note that in order to use the Generate eMail option, the facilitator needs to have a mailto link handler such as Outlook or other email managers.

Using option **a** allows the facilitator to copy the URL of the opinion map and send it to the webmaster of the target website to be inserted as the webmaster desires.

Option **b** allows the facilitator to send and email to the webmaster of the target website. The default email message contains both the URL of the opinion map and the HTML code example of an iframe that can be inserted in a webpage.

Option **c** generates an HTML code example of an iframe containing the opinion map that the facilitator can copy and send to the webmaster.

By clicking on "Generate eMail" link an e-mail box will open automatically, where the facilitator will enter the email address of webmaster, and then clicks on "Send" button.

After the webmaster has received this e-mail, he will integrate the html code into the Web site, and then a link to the interactive map will insert on this Web site.

Provide georeferenced Opinions

After the facilitator has published the opinion map and after it was integrated into some Web pages that are under public access, the citizens may express their opinions on this interactive map.

In order to provide georeferenced opinions the citizens will perform the following steps:

Step 1: Opening the Web site hosting the interactive map

The citizens will open the Web site hosting the interactive map, for example municipality's web page or other page.

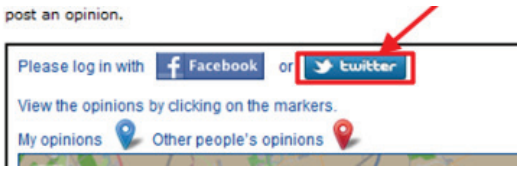
On this page the citizens will read the context info of the opinion map associated to a campaign, and also they will focus on the out-of-scope of this campaign.

Step 2: Providing the opinions

On this page, the citizens must first authenticate/authorize by Logging in using the Facebook/Twitter credentials (OAuth). An citizen that is not authenticated can not input opinions on the map. Given the options provided by the facilitator for the map, a citizen (authenticated or not) may be able to view and handle opinions on the map in different ways. Please refer to the section "Managing an opinion map" to review permissions.

On any given opinion map, two different types of pins may be visible:

- blue pins designate opinions input in the past on this map by the current authenticated citizen
- red pins designate other citizen's opinions



On this page, for example by clicking on the "Twitter" link a page will show up in order to authorize the citizen to FUPOL - Demo by using his account.

By clicking on "Authorize app" button the interactive opinion map page will reload, where the citizen is logged in with his name.

On this map the citizen can input his opinion by selecting an appropriate position on the map and by clicking on the right mouse button, the system will put a blue pin with the associated text box, where the citizen can type his opinion.

Step 3: Saving citizen's opinion

To close the opinion text box the citizen will click on the "Save" button, and then the system will validate the entered data and will store it as an artifact in the corresponding map layer.

The other authorization options is using a Facebook account. Clicking the Facebook button on the opinion map will take the citizen to the Facebook log in page (if the citizen is not already logged into Facebook) and then to the authorization page for the FUPOL application. Authorizing the app will take the citizen back to the opinion map where he can input his opinions by following the procedure described above.

Viewing Geo-referenced Opinions

After the citizens have provided their opinions during a campaign, the facilitator could obtain the details about citizens' opinions by viewing georeferenced opinions on a specific map. The facilitator might look at the map at any point in time, even if the campaign is still active and as such the collection of the opinions has not been completed yet.

For viewing georeferenced opinions the facilitator must be logged in FUPOL core platform and be opened a campaign.

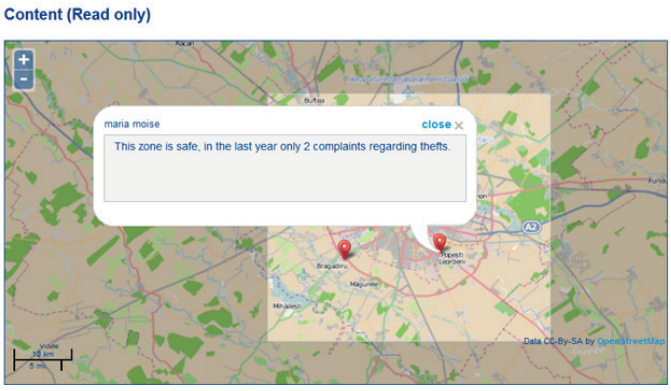
Note, that another way for the facilitator to open and see the details of the published map uses the interface that is available to the eCitizens.

In order to view the georeferenced opinions the facilitator must perform the following steps:

Step 1: Selecting the specific map

The facilitator will select the specific map from the Opinion Maps section (in the Tools section of the View Campaign page), by clicking on opinion map's name.

Step 2: Viewing the zonable/panable map with citizen's opinions



After clicking on the opinion map's name a page with the map's detail will show up.

At the bottom of this page the facilitator can see the zoonable/panable map with all the pins, representing the citizen's opinions for a given area in the city.

On the map the facilitator can see the citizen's opinions behind every pin by clicking on the pin.

On the map, by clicking on "close" button from the box containing the citizen's opinion, the facilitator can see again all pins.

Known issues with browsers

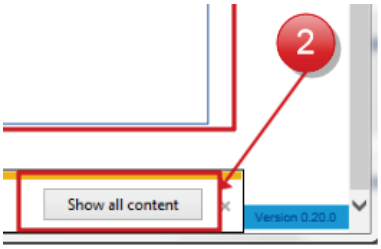
There are some known issues involving the display of opinion maps that affect some browser (e.g. Google Chrome and Microsoft Internet Explorer). The issue arises from the fact that opinion maps are loaded over a secured connection and some browsers require an additional step from the user to display the map. The illustration bellow show how to handle this issue if it arises.

Google Chrome

1. Notice the issue
2. Click the icon next to the address bar to allow for secure content loading
3. Click the "Load anyway" link

Microsoft Internet Explorer

1. Notice the issue
2. Click the "Show all content" link



For Internet Explorer, if the notification bar at the bottom doesn't show up, just refresh the page (hit the F5 key on the keyboard or the refresh button in the address bar ->).

Questionnaires

Questionnaires are a great way to collect specific data from citizens. A facilitator can create a questionnaire with multiple types of questions and get specific answers form people, so that he or she can build statistics on those answers.

Questionnaires, like opinion maps, can be created and maintained from the Tools tab found on the View Campaign page of of any given campaign.

A facilitator can create, view and publish a questionnaire. The following headings will guide one in those processes.

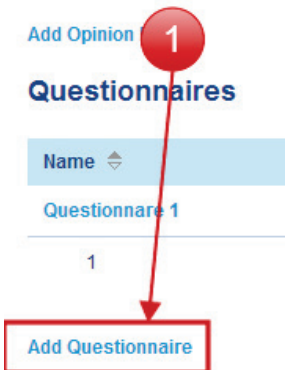
Creating a questionnaire

In order to create a questionnaire, one must be logged in as a facilitator and follow the steps described bellow:

1. Navigate to the campaigns page and select the desired campaign
2. Navigate to the Tools tab
3. Click the Add Questionnaire link
4. Fill in the form with a Name and a Description for the new questionnaire
5. Add questions to the questionnaire
6. Save the newly created questionnaire

Step 1. Navigate to the campaigns page and select the desired campaign

From the Home page, the user can select the Campaigns option from the main horizontal menu to navigate to the Show Campaigns page (1). From there, find the desired campaign in the campaign table displayed and click the campaign's



title (2). If there are many campaigns on the page, the user can navigate the table using the navigantion links at the bottom of the table (i) and / or choose the number of items the table should display (ii).

Step 2.Navigate to the Tools tab

Once on the View Campaign page, navigate to the Tools tab (1).

Step 3.Click the Add Questionnaire link

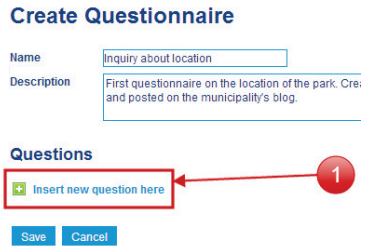
Once on the Tools tab, click the Add Questionnaire link (1).

Step 4.Fill in the form with a Name and a Description for the new questionnaire

Once on the questionnaire page, the user needs to fill in the form with the required details. The form requires the following fields to be filled in.

Data	Description
Name	The questionnaire's name. Used to differentiate between questionnaires. (1)
Description	The questionnaire's description. A more detailed description about the questionnaire. (2)

Step 5. Add questions to the questionnaire



Once the details of the questionnaire are filled in, it's time to add some questions. In order to add questions to the questionnaire, click the "Insert questions here" link. (1)

Once the "Insert questions here" link is clicked, the user has the possibility of adding questions.

On the "Questions" section, the form for entering question data has 7 inputs and 3 buttons. The meaning and roles of these form elements are explained in the following table.

Data	Description
Question	This text will be shown as the question itself. (1)
Purpose	The description is for internal use only. Add additional information describing the rationale behind the question etc. if you like. (2)
Additional text	The additional text is for additional information for a better understanding of the question. (3)
Selectable answers	The type of the question can be one of 8 choice presented by this field. (4) The choices for question types are the following: • Single Choice • Multiple Choice • Yes / No (2) • Yes / No / Maybe (3) • Agreement (5) • Satisfaction (5) • Rating (3) • Rating (5)

Add new answer	Adds a new answer to the question. Any number of answers can be added to a question. Each time the "add new answer" (5) link is clicked, a new Text input is presented (6) below the previous one that the user can fill with text. Any answer can be removed by clicking the "remove" (7) link beside it.
Allow user to deny answering	If checked, the question is presented to the target user with an option to deny answering it. (8)
Add comment	If checked (9), target users can enter free comments. Any text entered into the Text input will be presented to target users as description for the field. (10)
Ok	Click this button (11) to save the question and move forward.
Cancel	Click this button (12) to cancel adding the current question.
Preview	Click this button (13) to see a preview for the question. (14)

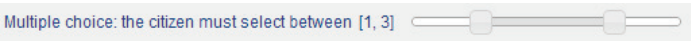
Extended explanations for the **Selectable answers** field:

Single Choice

Selecting this type of question will prepend all the answers with radio buttons. This means that only one of the added answers can be selected by the answering user.

Multiple Choice

Selecting this type of question will prepend all the answers with check-boxes. This means that an answering user will be able to choose any number of answers for the current question. Choosing this type of question will make another control appear on the form right bellow the question type. The facilitator can use this control to choose the minimum and the maximum number of answers an answering user can tick. This control will adapt automatically when the facilitator adds or removes answers. This control is a slider with two handles, one for maximum and ore for minimum and is exemplified in the following image.



Yes / No (2)

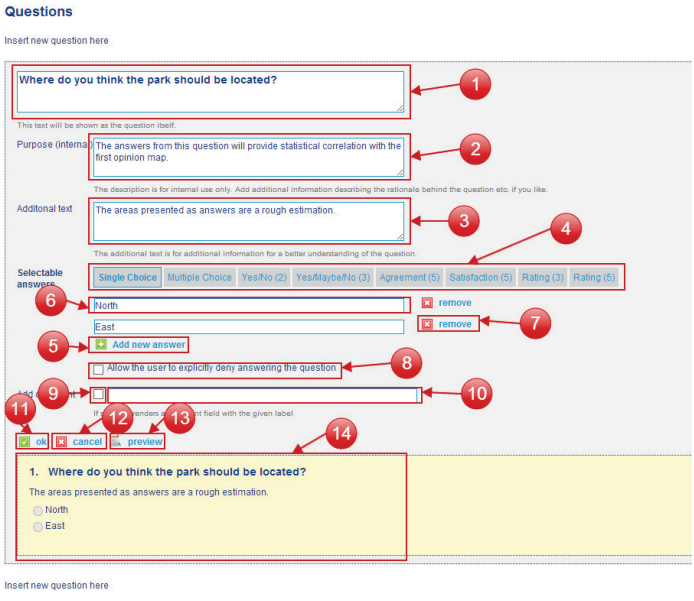
Selecting this type of question will turn every answer in a yes / no answer. This means that every answer will have two radio buttons attached to it corresponding to the yes / no pair. Only one value can be ticked.

Yes / No / Maybe (3)

Selecting this type of question is similar to the previous type. The only difference is that the question adds a new option: maybe. Only one value can be ticked.

Agreement (5)

Selecting this type of question is similar to the previous two types. Instead of a yes / no choice, the answering user is presented with five radio options corresponding with the level of agreement for the current answer. Level are presented from strong agreement


Questions
Insert new question here
Where do you think the park should be located?
This text will be shown as the question itself.
Purpose (interna
The answers from this question will provide statistical correlation with the first opinion map.
The description is for internal use only. Add additional information describing the rationale behind the question etc. if you like.
Additonal text
The areas presented as answers are a rough estimation.
The additional text is for additional information for a better understanding of the question.
Selectable answers
Single Choice
Multiple Choice
Yes/No (2)
Yes/Maybe/No (3)
Agreement (5)
Satisfaction (5)
Rating (3)
Rating (5)
North
East
remove
Add new answer
Allow the user to explicitly deny answering the question
ok
cancel
preview
1. Where do you think the park should be located?
The areas presented as answers are a rough estimation.
North
East
Insert new question here

to strong disagreement, from left to right. Only one value can be ticked.

Satisfaction (5)

Similar to the previous type, the satisfaction type offers five possible choice. This time the labels are presented from very satisfied to strongly dissatisfied. Only one value can be ticked.

Rating (3)

Like the previous types, this type turns every answer of the current question into a single choice answer by adding three value representing the rating of the answer. Only one value can be ticked.

Rating (5)

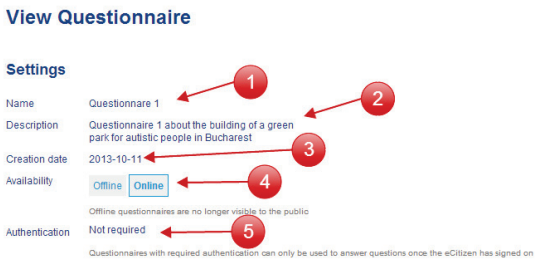
Similar to the previous type, the difference being that this is a five choice answer instead of three. Only one value can be ticked.

Step 6. Save the newly created questionnaire

After all the questions have been configured, the facilitator can save the questionnaire by clicking the Save button at the bottom of the page.

Publishing a questionnaire

After a questionnaire is created, the facilitator can publish it and then view statistics after users fill in the questionnaire. In order to publish a questionnaire, the facilitator must navigate to the View Questionnaire page. This is achieved by navigating to the Tools tab of the View page for the campaign which the questionnaire was created for. Once on the Tools tab, the facilitator can click the name of the desired questionnaire to navigate to the View Questionnaire page. (1)



Once on the View Questionnaire page, the facilitator is presented with 3 sections: Settings, Representations and Results.

The **Settings** section contains the following information.

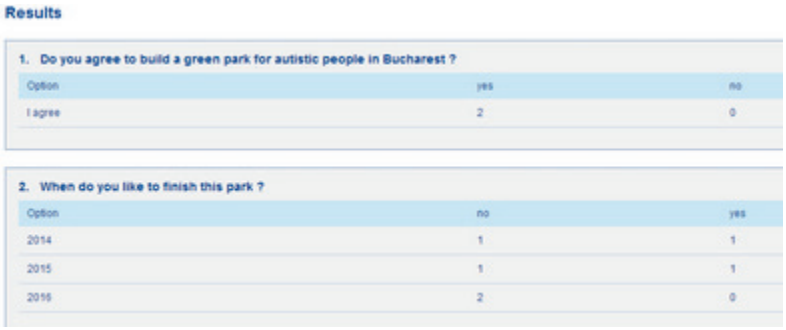
Field	Description
Name	The name of the questionnaire. (1)
Description	The description of the questionnaire. (2)
Creation date	The date the questionnaire was created. (3)
Availability	Whether the questionnaire is available for the public or not. The facilitator can switch between the Offline and Online states simply by clicking on the corresponding button. (4)
Authentication	Whether any citizen can see and answer the questionnaire or only authenticated users. (5)

The **Representations** section contains the following information.

Field	Description

Questionnaire URL	This is the direct URL to the questionnaire. Facilitators can post this link on websites for users to follow and answer the questionnaire. (1)
	Using this option, the facilitator can generate an email that contains general instructions on how the questionnaire can be integrated into an existing webiste by an administrator. (2)
Generate eMail	Icon
	Please note that by clicking this link the default email client on the facilitator's computer is invoked (e.g. Gmail, Outlook, Thunderbird). The FUPOL platform does NOT provide an email delivery system on its own.
Code Example	Using this option (3), the facilitator can generate an HTML code example for usage into an existing website. (4)

The **Results** section contains statistics on answers given by target citizens that have completed the questionnaire. An example results section is presented bellow.



Data Dictionary

The Data Dictionary is a tool that shows an overview of the data collected for the current campaign to the facilitator.

In order to access the Data Dictionary, the facilitator must follow these steps:

1. From the homepage of the FUPOL platform, navigate to the "Show campaign list" page
2. Navigate to the "View Campaign" page by clicking on the campaign name in the list of campaigns
3. Navigate to the "Data Dictionary" section by clicking the tab in the upper part of the page

The information that can be found in the Data Dictionary section of the View Campaign page is the following:

1. number of social media posts collected by the social media windows assigned to the current campaign
2. number of opinions posted for each opinion map created for the current campaign
3. number of completed questionnaires for each questionnaire created for the current campaign
4. information about statistical data assigned to the current campaign

If multiple opinion maps, questionnaires and statistical data sets are assigned to the current campaign, the facilitator can navigate through them by using the navigation controls under each section.

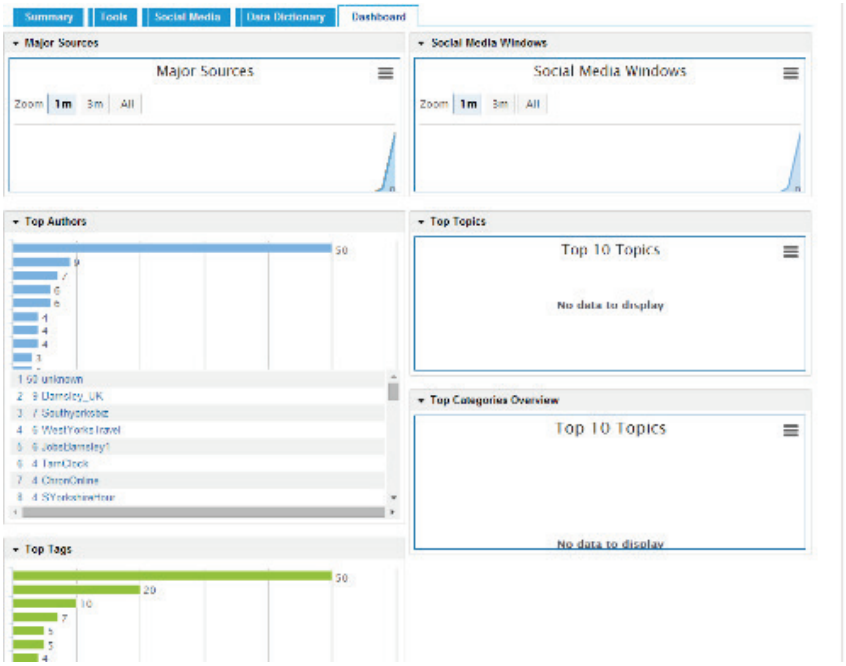
Dashboard

The Dashboard section of the "View Campaign" page provides the facilitator with data aggregates in the form of charts based on social media data collected for the current campaign.

In order to access the Dashboard section for a given campaign, the facilitator must follow these steps:

1. From the homepage of the FUPOL platform, navigate to the "Show campaign list" page
2. Navigate to the "View Campaign" page by clicking on the campaign name in the list of campaigns
3. Navigate to the "Dashboard" section by clicking the tab in the upper part of the page

On the Dashboard section, the facilitator can view data in chart form and analyze it by manipulating each chart separately. The Dashboard section is represented in the following diagram.



All charts are rendered in their own subsection of the page. Each subsection header (title bar) offers the following information and options to the facilitator as illustrated in the following diagram:

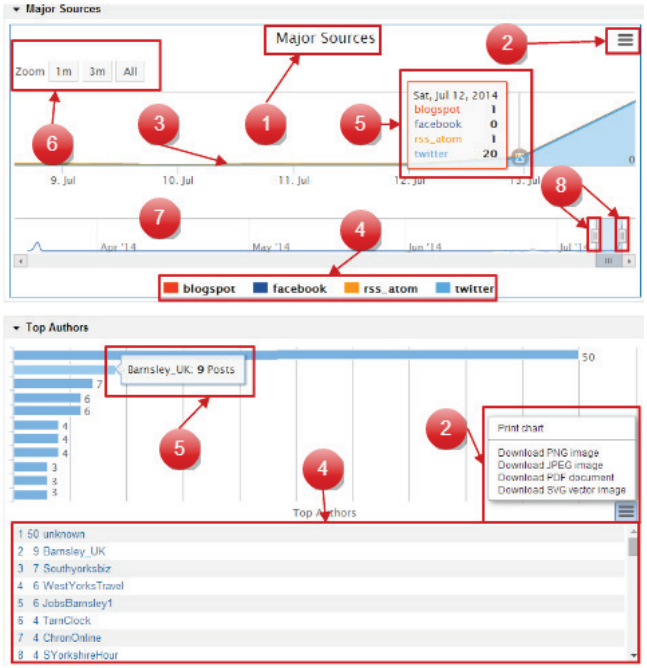
1. Collapse / Expand option (click the arrow in order to collapse or expand the graph; while collapsed, only the header section of the graph is shown)
2. Title of the graph
3. Refresh option (click the icon to refresh data and redraw the chart)
4. Move / reorder graphs on page option (in order to move and reorder the charts click and hold on the header of the chart and drag it around the page)

There are two types of charts that the facilitator can view in the Dashboard section:

- line chart
- bar chart

Each chart is rendered with the following information attached:

1. Title of the chart (line chart only)
2. Menu icon and expanded menu. From this menu the facilitator can print the chart or save it in various file formats (png, pdf, jpeg and svg)
3. Actual chart data
4. Legend (colored squares with labels for line charts and numbered list for bar chart)
5. Data point details (date and number for each legend item for line charts and legend label and count for bar charts)
6. Timeline zoom (line charts only). These options will auto-zoom the data in a line chart to certain date periods (example show options for 1 month, 3 month or all data)
7. Timeline (line chart only) for all represented data
8. Timeline manual zoom handles. If dragged, these handles will trigger the chart to be redrawn to accommodate the data for the selected time period



In the Dashboard page, the following graphs can be used to analyze social media collected data:

1. Major sources of data - evolutionary line chart
2. Social media windows - evolutionary line chart
3. Top authors - horizontal bar chart
4. Top tags - horizontal bar chart
5. Top links - horizontal bar chart

Major sources of data

This chart shows the timeline evolution of data collected through the major sources of data (social media targets) over the timeline of the campaign.

Social media windows

This chart shows how much data has been collected by each of the social media windows attached to the current campaign over the course of the campaign's lifetime.

Top authors

Data shown in this chart represents the main authors from the different social media platforms that have posts collected through social media windows.

Top tags

Top Twitter tags found in the social media data collected using social media windows and targets. These tags do not have to be specifically searched using social media targets, but are analyzed by the FUPOL system from each individual post.

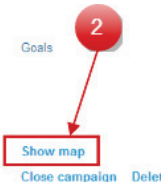
Top links

Top HTML links found in social media collected data. Each link in the chart legend is a live link and ca be directly followed by the facilitator.

Heat map

Some social media data that is collected has location information attached (some Twitter posts, for example). This information is used to build a heat map for the collected data. The heat map is an overlay of information over a geographical map that show the concentration of posts based on their location. The heat map can be viewed from the "View Campaign" page of every campaign. In order to access the heat map the facilitator has to do the following:

1. Access the "View Campaign" page for the desired campaign
2. Scroll to the bottom of the page and click the "Head Map" link
3. Toggle different options on the heat map



Once the heat map is toggled, the facilitator can toggle options and render the map. Some of these options are as follows:

1. Social media targets toggle (choose whether to display posts from all social media targets or just individual ones)
2. Display options:
    1) Show pins (show individual pins for each post)
    2) Show heatmap (toggle heatmap colors)
    3) Client city (toggle whether to display the client city defined rectangle)
    4) Center at client city (center map on client city)
    5) Fullscreen
3. Map
4. Satellite (show satellite imagery)
5. Terrain (show street map with terrain)

Closing a campaign

After all data has been collected and analyzed and the campaign has ended it's time to close the campaign on the FUPOL platform.

In order to close a campaign follow these steps:

1. Navigate to the campain list
2. Click the name of the desired campaign

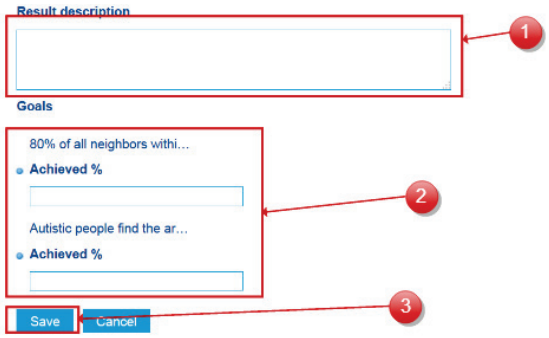
After the "View campaign" page loads chose to close the campaign:

1. Click the "close campaign" link

On the "Close campaign" page review the campaign details and fill in the form fields.

On the second half of the "Close campaign" page, fill in the form fields and close the campaign:

1. Fill in the "result description" field
2. Fill in achievement percentage for each goal
3. Close the campaign by clicking "Save"



Field description:

Data	Content
result description	A description of the result of the campaign.
achieved %	How much a specific goal has been achieved, in percentages

Deleting a campaign

In order for a facilitator to delete a campaign, he must navigate to the "Show Campaign" page and click the Delete link at the bottom of the page (1).

Working with Social Media

Social Media Management involves the collection and analysis of social media content. Social media in this case means any site whose content is provided by eCitizens. Social media content is content (text) and associated meta-info (that describes the content's origin and details about the crawling task) that has been collected from a Social Media Target during a Crawling Job.

In order to collect social media content, social media accounts must be set up (see System Administration section), social media windows created and search criteria defined.

In order to collect social media content two things need to be set-up:

1. social media account
2. social media windows and targets

Social media account are set-up by an administrator. Please review the chapter that deals with social media account management for further details.

Social media windows and social media targets are set-up by the facilitator for a campaign.

A social media window is both a concept and an important domain object in FUPOL. As a concept the term refers to the idea that a Facilitator is interested in accessing several social media sites in a convenient way ("single window to social media"). The domain object is a container for social media access and the associated results (content).

A social media target is an access coordinate that refers to a social media site and the way that FUPOL shall collect the data from there.

Social Media Windows

Social media windows are set-up by a facilitator. He /she also sets-up social media targets and adds social media windows to campaigns, runs scheduled or one time search operations, reviews collected data, edits social media windows and targets and deletes social media windows.

Adding a new social media window

In order to add a new social media window, the facilitator needs to follow these simple steps:

1. Log into the *"FUPOL-Client platform"*
2. Navigate to the *"Social Media"* page
3. Click the *"Add social media window"* link in the left hand side menu
4. Add social media targets
5. Save the social media window

Step 1: Log into the *"FUPOL-Client platform"*

This step is covered in depth in prior chapters.

Step 2: Navigate to the *"Social Media"* page

1. On the Fupol-client start page click the Social Media link in the top meniu

Step 3: Click the *"Add social media window"* link in the left hand side menu

Note that this step may be optional. The *"Add social media window"* loads by default when navigating to the Social Media section of the client.

1. Click the *"Add social media window"* link

Step 4: Add social media targets

From the *"Add social media window"* new social media targets can be added and configured. Repeat the following sets of steps to add more social media targets to the current social media window. The platform currently supports Facebook, Twitter, Blogspot and Facebook Groups as social media targets. Steps for adding a target of each type ar described bellow.

1. Choose a social media site from the select box
2. Click the *"select new target"* link

After the the add form slides into view, the facilitator can add keywords to the social media target.

Note that by clicking on the Show Help link just under the text box for any keywords will provide help on how to enter keywords for the selected platform.

The keywords entered can follow these patterns:

Twitter:

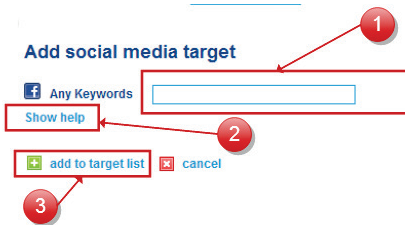
Example	Finds tweets...
london olympics	containing "london" or "olympics". This is the default operator.
"london olympics"	containing the exact phrase "london olympics"
london -olympics	containing "london " but not "olympics"
#london	containing the hashtag "london"
from:London2012	sent from the user @London2012
@London2012	mentioning @London2012
london -olympics:)	containing "london", but not "olympics", and with a positive attitude.
london :(	containing "london" and with a negative attitude.
london ?	containing "london" and asking a question.

Facebook:

Example	**Find Public Posts.**
london olympics	This is the default operator for a public post containing "london" or "olympics".

london"+"olympics contains the exact phrase "london olympics"

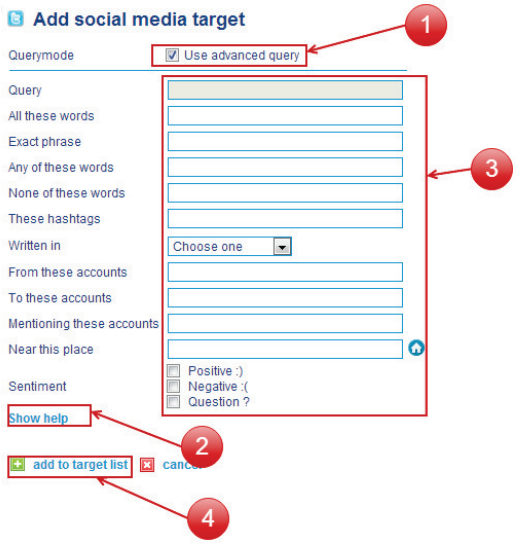
Facebook



1. Add keywords
2. Click the Show help link to view examples
3. Click the *"add to target list"* link

Twitter

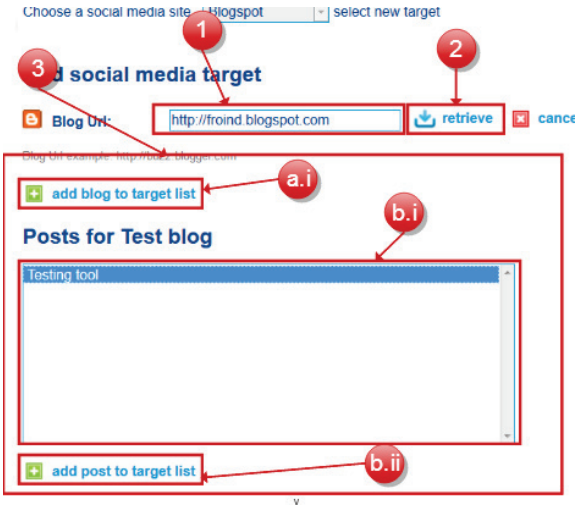
1. Toggle the advanced query checkbox; toggling this checkbox allows for more refined search
2. Click the show help link to view query examples
3. Fill in the query fields
4. Click the *"add to target list"* link



Blogspot

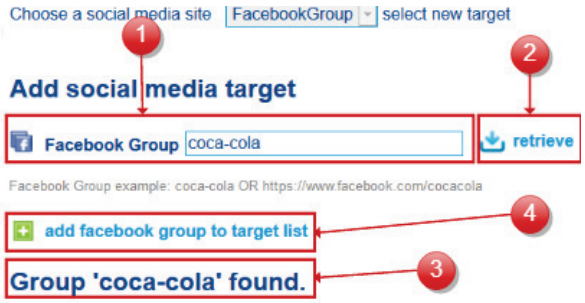
Note that, as opposed to Facebook an Twitter, the FUPOL platform can only crawl specific blogs, not the entire Blogspot sphere. Each blog has to be added as a social media target in order to crawl several blogs using one social media window. Blogs and posts are actually monitored, not mined for specific keywords.

1. Add the specific blog URL
2. Click the *"retrieve"* link
3. Chose an option from the following:
    a. Add the entire blog
        i. Click the "add blog to target list" link to add the entire blog
    b. add specific posts
        i. Select specific posts from the blog
        ii. Click the "add post to target list"



Please note that if the blog is entered incorrectly, an error message is shown.

Facebook Group

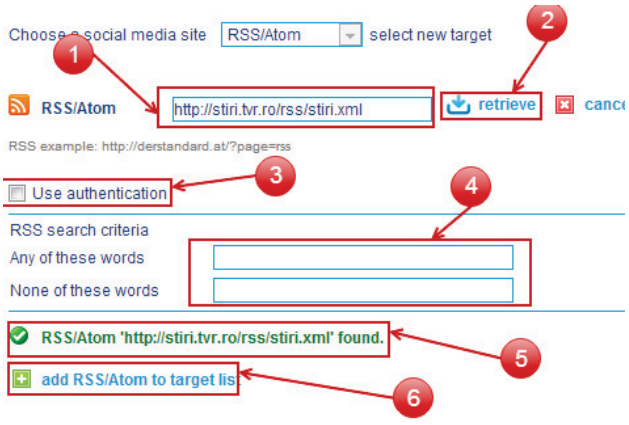


1. Add the name or url of the page
2. Click the *"retrieve"* link
3. Notice the message returned by the "retrieve" action
4. Click the "add facebook group to target list"

Please note that if the Facebook Group is not found an appropriate error message is displayed after step 3.

RSS / Atom feed

1. Fill in the RSS / Atom text box with the link to the rss / atom feed
2. Click the retrieve button to fetch the feed
3. Optionally check the use authentication option and fill in the username and password fields that show
4. Optionally fill in the search criteria text boxes to filter the feed items
5. Notice the message saying the feed was retrieved successfully
6. Add the new target to the target list



Step 5: Save the social media window

After the addition of social media targets, the facilitator should save the social media window.

1. Click the *"Save social media window"* link from the grey box on the right hand side of the page

On the following page, fill in the form fields and save the social media window.

The fields in the form are described bellow.

Field	Description
Title	The title of the social media window
Description	Description of the social media window
Campaign	Campaign the social media window is created for
Scheduler	Boolean value. Check to collect data from the social media window on a schedule
Interval	How often should the collect job be performed
End event	If a schedule is selected, choose how the collection of data should end
Calendar	If a schedule is selected, and a calendar end event is chosen, input the start and end dates

1. Input the name of the social media window
2. Input a description
3. Choose a campaign
4. Check to run on a schedule
5. Choose a repeat interval
6. Choose an end event
7. Input a calendar
8. save the social media window

Social Media Targets

Social media targets can also be added to social media windows after they are saved. Social media targets can be deleted and edited.

Adding new social media targets

1. Choose a social media window from the select box on the left hand side menu
2. Click the *"add new target"* link in the right hand side menu
3. Run the add new social media target step described above

Editing social media targets

1. Select a social media window
2. Locate the social media target in the social media target list
3. Click the edit icon beside the social media target
4. Edit the keywords
5. Save the social media target

Deleting social media targets

1. Select a social media window
2. Locate the social media target in the social media target list
3. Click the delete icon beside the social media target

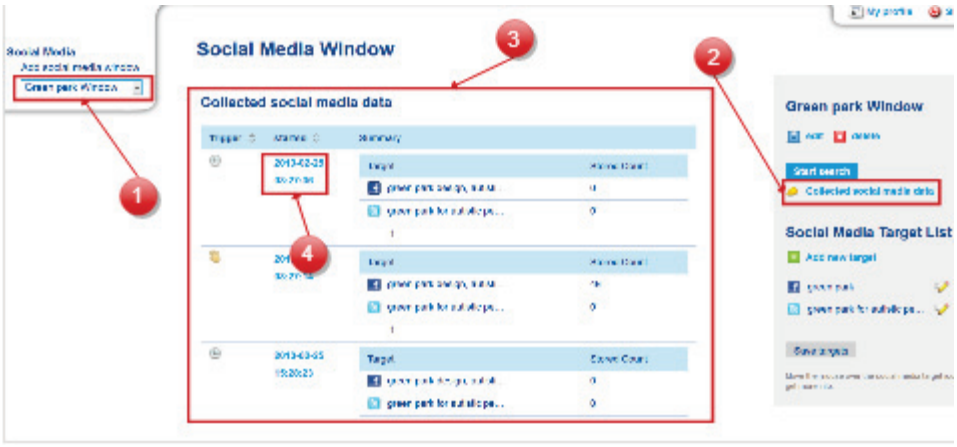
Searching for social media data

Searching for social media data can be run on a schedule, if the social media window was set to do it, or it can be done manually.

1. Select a social media window
2. Click the *"start search"* button

Viewing collected social media data

1. Select a social media window
2. Click the *"Collected social media data"* link
3. Review the data
4. Click the timestamp next to a search to view the collected data



Clicking a timestamp opens the "search results" page where the search results are presented. On this page, the user has the following options:

1. Click the social media website icon beside a certain results. This takes the user to the actual post on the social media website. An example is illustrated bellow for a Facebook search results page.
2. View the number of pages for the collected social media data
3. Navigate through the social media results pages
4. Choose how many posts should be displayed on a single page

In a similar fashion, posts on Twitter, Blogspot and Facebook Groups can be accessed.

Searching inside collected social media data

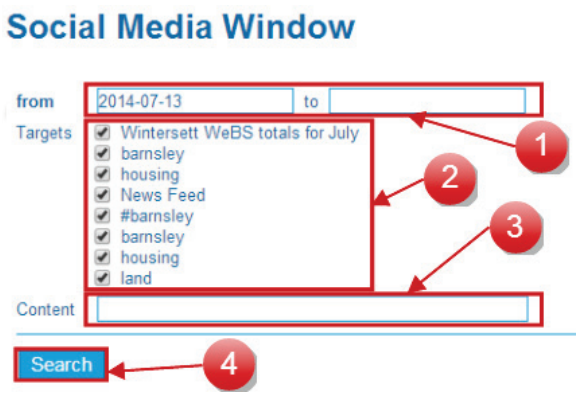
After collecting social media data, a user can search through it by using the search capabilities of the FUPOL platform.

Searching from the social media window

In order to access the search functionality, the user needs to click on the "Search inside collected data" link on the social media window page (1).

The previous action opens the search form for the social media data collected for the current social media window. Using this form, the user can filter collected social media data using the following options:

1. Date interval
2. Social media targets
3. Actual content
4. Submit the search query



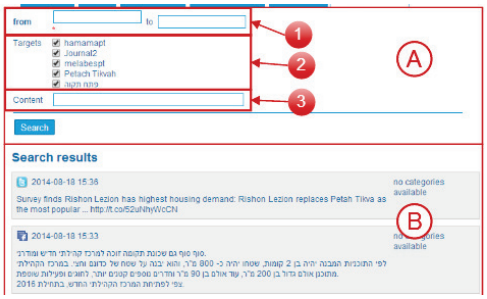
Searching from the campaign page

On each campaign's page, the "Campaign Data" tab can be used to search inside social media data collected with the use of the associated social media windows.

The "Campaign Data" page is divided in 2 sections:

A. Search form

B. Search results



By default, the page displays all posts that have been collected since the previous calendar day, but the facilitator can easily change the search criteria to his or her needs.

The search form is comprised of:

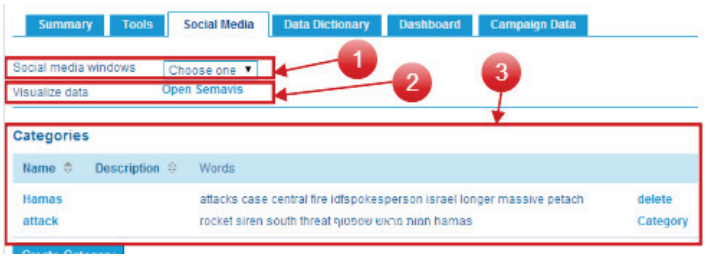
1. The start and end date filters - the start filter is compulsory
2. The targets filter
3. The content filter

Organizing social media data into categories

After a social media window is set up for a campaign, the facilitator can create categories in order to organize the posts that will be gathered by the social media window.

The social media tab and creating a category

In order for the facilitator to create a category, he must follow these steps:



1. Navigate to the campaign page for the associated social media window
2. Open the "Social Media" tab
3. Click the "Create Category" link
4. Fill in the category form
5. Click the "Save" link

The social media tab of a campaign shows information about that campaign's social media activities, like associated social media windows (1), data visualization options (2), the list of categories created (3).

Creating a category

In order to create a new category, the facilitator must click the "Create Category" link under the "Categories" table illustrated above (section 3). After clicking the link, the "Create Category" form opens up in a modal dialog. The following table describes the information a facilitator finds in this form.

Data	Content
Category Title	(1) This field contains the title of the category.
Category Description	(2) This field contains the description of the category.
Category Words	(3) This field contains the words that are already added to the current category. If no words have been added to the category an appropriate message is shown instead.
Topic Words	(4) This field contains all the words extracted by the hot topic sensing engine integrated into the FUPOL platform.
Sort Words by	(5) This option lets the facilitator sort the topic words either by value or probability.
Add Category Word	(6) This field lets the facilitator manually add a new word if that word is not present in the topic words list.

Topic words

The topic words functionality implemented by the FUPOL platform uses the Hot Topic Engine to scan social media data and determine and assign measuring attributes (such as probability) to words used in social media posts. The engine creates topics (1) "on the fly" and groups words under these topics (2). Each topic has a "Quality" (3) assigned in numerical form. The probability (4) of a word to appear in a topic is revealed when the facilitator hover the mouse cursor over a word.

The Hot Topic Sensing engine only works after the social media windows attached to the campaign have collected enough posts. The number of posts needed for hot topic sensing may be in the hundreds or even thousands.

Adding words to a category

Category words can be added in two distinct ways:

1. Facilitator input words - by using the "Add Category Word" field in the "Add Category" modal form
2. Topic detected words - by using the "Topic Words" section of the "Add Category" modal form

Adding a topic to a category is just a matter of clicking the "Add" link (5) next to it in the list of topic words. Adding a whole topic adds the entire list of words to the category, but the facilitator can remove specific words by clicking the "x" mark (6) next to each word in the "Category Words" field.

Editing or deleting a category

Editing a category is as easy as clicking the category name (1) in the list of categories found in the social media tab of a campaign. The "Edit Category" modal form will be revealed and the facilitator can edit category data on the spot.

In the same manner, deleting a category is accomplished by clicking the "Delete Category" (2) to the right of the category list under the social media tab of a given campaign.

Social media posts and categories

After a category is created by the facilitator, social media posts that fall into that category will display the category title as a label beside (1). Posts that do not fall under any category will display an appropriate message (2). This category information is displayed whenever the facilitator views social media collected data, such as under the "Campaign Data" tab of a campaign's page, or under the "Collected social media data" section of a social media window.

Detailed category information

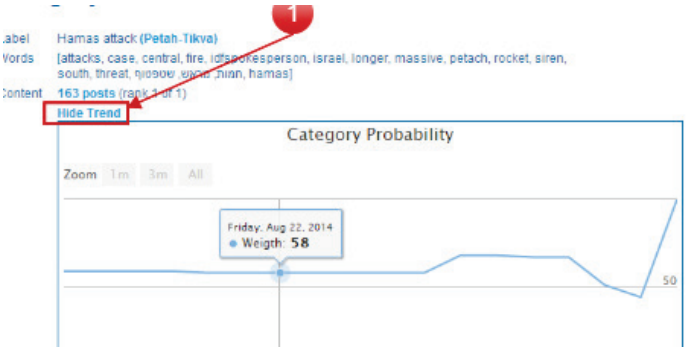
The FUPOL platform allows a facilitator to view detailed information on a category by clicking the name of that category next to a social media post (as described in the previous section).

On each category page there are several pieces of information displayed:

1. The category title (label)
2. The category words
3. The category content (the number of posts that fall under the category)
4. The category trend
5. The category summary
6. The category hotspots map

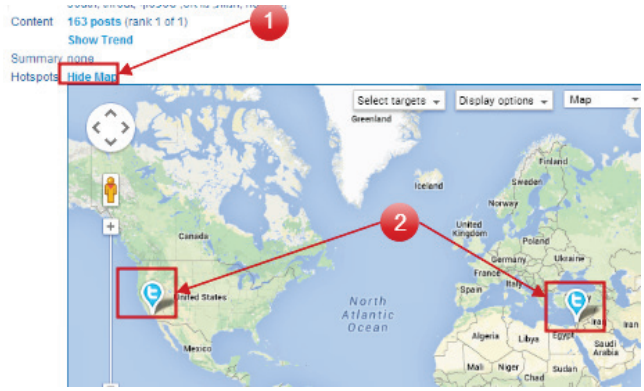
Category trend

The category trend is displayed in chart mode, showing the future probability for the category contents. The facilitator can toggle the display of the chart by using the "Show / Hide Trend" (1) link in the "Content" section of the category.



Category map

The category hotspots map can be used to view an overlay of the posts from the category on a geographical map. Please not that only posts that have geographical positioning information attached to them can be shown on the map (2). The map can be toggled in and out of view by using the "Show / Hide Map" link (1) in the "Hotspots" section of the category page.



Editing a social media window

1. Select a social media window
2. Click the *"Edit"* button
3. Edit the social media window information

Review the *"Add a social media window"* section for detailed information about the form.

Deleting a social media window

1. Select a social media window
2. Click the *"Delete"* link
3. Confirm the decision